

Family Philanthropy Workshop

Business Families Centre



This half-day workshop will provide you and your family with practical tools to identify and plan for a cohesive approach to your family's philanthropy. You will identify how to overcome common hurdles to formalizing your family's charitable giving, and engage with best practices for initiating your family's philanthropic legacy.

Family Philanthropy Workshop

Planned charitable giving and community involvement are key components to many successful family enterprises. Family philanthropy presents business families with a unique vehicle to entrench family values, create a new family purpose, and engage with the broader community in which they operate. For many family firms, the question is not whether to partake in family philanthropy, but how to get started, and to focus the family's giving in an organized and strategic way.

Format

The half-day Family Philanthropy Workshop includes three key components: education, discussion, and practice. Family philanthropy theory is blended with applied learning activities to maximize the educational experience and provide participants with concrete takeaways. Faculty-led conversation is used to introduce core concepts, which participants then apply to real scenarios and their own family circumstances during activities and discussion.



FAMILY PHILANTHROPY WORKSHOP

COURSE DATE: Contact us for dates

FEE: \$325 + tax

Core teachings and takeaways

- Address the taboo topics of wealth and money and learn how to create a constructive discussion in your family around these subjects
- Identify and explore various types of philanthropy structures and strategies, and determine which of those best fits your family's values and goals
- Identify and work through common roadblocks to getting started on formalizing your family's charitable giving
- Discover the journey other families have taken to identify their philanthropic goals and establish private foundations
- Identify six key steps to initiate a cohesive approach to your family's philanthropy
- Plan your family's first philanthropy meeting

Audience

This workshop is at a fundamental level and does not require previous philanthropy knowledge. It is particularly useful for families looking to introduce or better structure their charitable giving.

Family members may attend individually or alongside other members of their family. The workshop is suitable for all family members, whether active in the business or not. Enrolment is restricted to members of family firms.

Faculty

WENDY SAGE HAYWARD



Wendy is an adjunct professor at the UBC Sauder School of Business with over 25 years of experience in working with business leaders and family firms. Recognized as a thought leader in creating educational experiences for business families, Wendy has worked with the Business Families Centre to develop and deliver a number of programs for family firms and their professional advisors. In particular, she facilitates multi-generational conversations on firm continuity, next generation

preparation, and governance. A member of a century-old family enterprise herself, Wendy is one of the directors of the board of her family enterprise, which has over 40 partners in the cousin consortium stage.

Business Families Centre

Since 2001, the Business Families Centre has helped business families to address their most complex challenges. Working at the intersection of family enterprise and business acumen, UBC Sauder's Business Families Centre advocates education as the central path to success for all enterprising families. The Business Families Centre is an unrivaled resource for every issue relevant to the family enterprise, including governance, relationship management, wealth preservation, intergenerational transitions, and next generation leadership.

Program Support



SCHEDULE OR LEARN MORE:

To find out more about this course and the Business Families Centre at UBC Sauder School of Business, please contact us at:

604-822-0102 | bfc@sauder.ubc.ca

or visit www.sauder.ubc.ca/bfc